



# Managing Users

Admin Guide For SAM



**This presentation was created by logging into the System for Award Management (SAM) with Internet Explorer 8. If you are using a different Internet Browser to access SAM, such as Google Chrome, Firefox or another version of Internet Explorer your screens may appear slightly different.**



**This presentation assists in Managing Users and User Roles for Entity Records in the System for Award Management.**

**This presentation does not pertain to United States Federal Government Agencies or their Hierarchy.**



## Request a Role.

- (1) Select Manage My User Roles.
- (2) Select Request Role with New Entity.

**SAM**  
SYSTEM FOR AWARD MANAGEMENT

MY SAM | SEARCH RECORDS | DATA ACCESS | GENERAL INFO | HELP

MY SAM

Manage My User Roles

My Roles

Invitations

Migrate Legacy System Account

Migrated Accounts

Request Role with New Entity

Welcome, Your name

Would you like to migrate a legacy system account?

Welcome to SAM!

**Notice for all registered users:**  
The 2012 North American Industry Classification Standards (NAICS codes) are now active. As part of this change, the Small Business Administration (SBA) has been reviewing and updating its table of size standards. Size Standards changes have the following dates:

1. October 1, 2012
2. October 24, 2012
3. January 7, 2013

Impact to you:



**Select NO, unless you are from a Federal Agency.  
Select Next.**

### US Federal Government User?

US Federal Government User?

Please indicate whether you are joining an entity in the United States Federal Government Hierarchy.

Are you a user from a US Federal Government agency ?

Please select a value

Please select a value

Yes

No

CANCEL

NEXT





# Search for an Entity.

**(1) Enter DUNS Number.**  
**(2) Select Next.**

## Select Entity

### Select Entity

Please enter the DUNS number for the Entity you wish to join. If you do not know the DUNS number, you can perform a search by providing the name of the entity.

**1****DUNS :** **OR****Name :** **2**



## Select the Entity.

### Select Entity

Please select the entity you wish to join by using the radio button to the left of entity record and using the Next button. You can perform another search by entering new search criteria and using the Search button.

*You Searched for 99999999*

DUNS :

OR

SEARCH

CLEAR

Name :

### 1 RESULTS FOUND

DUNS Number: 999999999



Entity Name: Your company

Address Line 1: Your address

Address Line 2:

City: Your city

State: Your state ZIP/Postal Code: 99999

Country: Your country



# Expand roles to request Level of Access.

## Assign Roles

### Select Roles

Please select the Roles you wish to request for this Entity by adding them under the "Request Roles" section. You will notified once the administrator approves the request

### Role Pick List



Entity Administrator

Select plus sign to  
expand selection

### User's Roles





# Select the appropriate boxes to request Roles.

## Assign Roles

### Select Roles

Please select the Roles you wish to request for this Entity by adding them under the "Request Roles" section. You will notified once the administrator approves the request

### Role Pick List

- Entity Administrator*
- Entity Registration Representative*
  - Entity Registration Viewer*
  - Services Contract Inventory Reporter*

Check all boxes that apply

### User's Roles

- Entity Administrator*
- Entity Registration Representative*
  - Entity Registration Viewer*
  - Services Contract Inventory Reporter*



You must enter Reason. **Select Next.**

### Role Pick List

- Entity Administrator*
- Entity Registration Representative*
  - Entity Registration Viewer*
  - Services Contract Inventory Reporter*

### User's Roles

- Entity Administrator
  - Entity Registration Representative
    - Entity Registration Viewer
    - Services Contract Inventory Reporter

Reason for Request :\*

**Enter Reason** →

CANCEL PREVIOUS **NEXT** ←



# Summary Page. **Select Submit.**

Entity Name:

Address Line 1:

Address Line 2:

City:

State:

Country:

ZIP / Postal Code:

DUNS:

## Roles

EDIT

**Requested the following Roles:**

Entity Administrator

Entity Registration Representative

Services Contract Inventory Reporter

Entity Registration Viewer

**Reason for Request :**

training

CANCEL

PREVIOUS

SUBMIT



# Confirmation Page.

## Select Done.

### Request Roles with New Entity

Roles Request Sent - Confirmation

#### Confirmation

Mon Apr 29 11:16:22 EDT 2013

The request for association and roles has been sent to the appropriate administrator in the entity. You will be notified once the administrator takes action on the request. Use the **Done** button to continue.

PRINT

SAVE

DONE





# How to Approve A Role Request



# Approving Role Requests.

## (1) Select Manage Entity Users.

## (2) Select Pending Roles Requests.

**MY SAM**

---

Manage My User Roles

**Manage Entity Users**

Users List

Pending Sent Invitations

**Pending Roles Requests**

Invite User

---

Register/Update Entity

Account Settings

Data Access

General

Welcome,

Would you like to migrate a legacy system account?

Notice for all registered users:

The 2012 North American Industry Classification Standards (NAICS codes) are now active. As part of this change, the Small Business Administration (SBA) has been reviewing and updating its table of size standards. Size Standards changes have taken place on the following dates:

1. October 24, 2012
2. January 7, 2013

Impact to you:

1. The NAICS you selected in the Assertions section of your registration will not be affected and no action is needed at this time. However, the next time you update your record, you will be required to update the NAICS to ensure that they are in accordance with the 2012 list.
2. The NAICS lists to which you certified in your representations and certifications will be updated as follows:



# View request by selecting View button.

MY SAM    SEARCH RECORDS    DATA ACCESS    GENERAL INFO    HELP   

**MY SAM**

Manage My User Roles

**Manage Entity Users**

Users List

Pending Sent Invitations

**Pending Roles Requests**

**Pending Role Requests**

Pending Requests

The section below contains a list of pending role requests you have from users to join the entity.

Action	Request Date	Entity Name	Requester's First Name	Requester's Last Name
<a href="#">VIEW</a>	2014-01-24 13:04:21.0	Your company	Your	Name



# Summary of Role Request.

User: Yourname  
Account State: Active

UNLOCK

## Requested Roles

The user has requested the following roles under your role and entity authority. Upon opening a request, you will have the opportunity to approve either all, additional or some of the requested roles. You can also reject the role request in its entirety. The roles you cannot grant this user have been grayed out below.

## Requested Roles (Please select one of the following requests)


Date Requested	Entity	Roles
2013-04-29 11:16:21.0	Your company	Entity Administrator, Entity Registration Representative, Services Contract Inventory Reporter, Entity Registration Viewer





# Select appropriate boxes to select Roles.

Request Details	
<b>Entity Details:</b>	<b>Request Details:</b>
Entity Name: Your company	Requested Date: 2013-04-29 11:16:21.0
Department Code:	Reason for Request: training
Agency Code:	
Office Code:	
Node Type: 0	
Node Status: Active	
Address Line 1:	<input type="checkbox"/> Entity Administrator <input type="checkbox"/> Entity Registration Representative <input type="checkbox"/> Entity Registration Viewer <input type="checkbox"/> Services Contract Inventory Reporter
Address Line 2:	
City: Your city	
State: Your state	
ZIP/Postal Code: Your zip code	
Country: Your country	
DUNS Number: 999999999	
DoDAAC:	




Select Role(s)



## Select the appropriate button for Rejecting a Request or Approving a Role.

DUNS Number: 999999999	
DoDAAC:	



**REJECT ENTIRE REQUEST**   **APPROVE SELECTED ROLES**



# Entity information displayed for Rejecting a Request.

## Select Submit.


User: Your name UNLOCK  
Account State: Active

Summary

Please validate the information below is correct before submitting. Upon using the **Submit** button the user's request for roles will be rejected. Use the **EDIT** button to make changes to the appropriate section.

Requested Roles EDIT

Entity	Role
Your company	Entity Administrator, Entity Registration Representative, Services Contract Inventory Reporter, Entity Registration Viewer

CANCEL  SUBMIT



# Confirm Rejection. **Select Done.**

## Individual User Account

RolesRejected - Confirmation

### Confirmation

Mon Apr 29 11:32:13 EDT 2013

Roles requested by the user have been rejected. If the user does not have other roles with the entity the user will remain unassociated from the entity. The user will be notified. Click the 'Done' button to continue.

DONE



CANCEL



# Entity information displayed for Approving a Role. Select Submit.

User: Your Name UNLOCK

Account State: Active

---

Summary

Please validate the information below is correct before submitting. Upon clicking the **Submit** button the user's request for roles will be granted the roles identified below. Click the **EDIT** button to make changes to the appropriate section. Click the **CANCEL** button to return to the list of pending role requests.

---

**Requested Roles** EDIT

Entity	Role
Your company	Reporter, Entity Registration Representative, Entity Administrator, Entity Registration Viewer

CANCEL

SUBMIT



# Confirm Approval. **Select Done.**

## Individual User Account

RolesGranted - Confirmation

### Confirmation

Mon Apr 29 11:49:49 EDT 2013

The roles you previously identified has been granted to the user. The user is now associated with this entity. Via this association, you have the administrative rights over this user at all the entities where you are identified as an administrator. The user will be notified. Click the 'Done' button to continue.

DONE



CANCEL



# How to Invite a User



# Invite User.

- (1) Select Manage Entity Users.
- (2) Select Invite User.

The screenshot shows the 'MY SAM' user interface. On the left is a navigation menu with the following items: Manage My User Roles, Manage Entity Users (highlighted with a red arrow and the number '1'), Users List, Pending Sent Invitations, Pending Roles Requests, Invite User (highlighted with a red arrow and the number '2'), Register/Update Entity, Account Settings, Data Access, and General. The main content area at the top has a blue header with the text 'Would you like to migrate a legacy system account?' and two buttons: 'YES' and 'HIDE MESSAGE'. Below this is a 'Welcome to SAM!' message followed by a section titled 'Registered users:'. The text explains that the 2012 North American Industry Classification Standards (NAICS codes) are now active and that the Small Business Administration (SBA) has been reviewing and updating its table of size standards. It lists two dates: 1. October 1, 2012 and 2. October 24, 2012. Below this is a section titled 'Impact to you:' with two numbered points: 1. The NAICS you selected in the Assertions section of your registration will not be affected and no action is needed at this time. However, the next time you update your record, you will be required to update the NAICS to ensure that they are in accordance with the 2012 list. 2. The NAICS lists to which you certified in your representations and certifications will be updated as follows: If the description of the NAICS has been changed, you will now see the 2012 version of the description in the table. If the size standard itself has been changed, and this affects the 'Yes' or 'No' answer (Small or Other Than Small) on your NAICS tables at 52.219-1 and 52.212-3, SAM will place an exclamation point (!) next to the 'Yes' or 'No' answer to show that it should be reviewed. The next time you update your reps and certs the answers will be displayed as per the 2012 standards, so you can certify to those at that time and the exclamation points will be removed.







# Invite a User. **Select the Entity. Select Next.**

Entity List	Registration Details
<ul style="list-style-type: none"><li>Your company</li><li>Your company</li></ul>	<p><b>Entity Name:</b> Your company</p> <p><b>Entity Details</b></p> <p>DUNS Number: 999999999</p> <p>Address Line 1: Your address</p> <p>Address Line 2:</p> <p>City: Your city</p> <p>State: Your state</p> <p>ZIP/Postal Code: Your zip</p> <p>Country: Your country</p>

CANCEL

NEXT





To invite a User, enter the email address linked to the User Account. **Select Next.**

Invite User

**Enter User Email Address**

Enter User Email Address

Please provide the email address of the user you wish to invite. SAM will perform a search to see if the user already has an account in SAM.

Email Address\* :



## The information from the email will pre-populate the User Account. **Select YES, Invite User.**

Invite User

**User Search Results**

Content Glossary

✓ Select Entity

✓ Enter User Email Address

▸ [User Search Results](#)

▸ Assign Roles

▸ Summary



User Search Results

The following user information was found for the email address you provided.


Title :	Mr.
First Name :	Your
Middle Initial :	
Last Name :	Name
Phone Number :	(555)555-5555
Extension :	
Email Address :	youremail@email.com

Would you like to invite this user?

CANCEL NO, PERFORM ANOTHER SEARCH **YES, INVITE USER**

Status Indicators:  

- Email Address (User)
- Title (User)
- First Name (User)
- Middle Initial (User)
- Last Name (User)
- Phone (User)
- Phone Extension (User)





# Determine the Role for the User.

## Select from the Role Pick List.

The screenshot displays two side-by-side panels. The left panel, titled 'Role Pick List', contains a single entry: 'Entity Administrator'. This entry is preceded by a plus sign in a square, a checked checkbox, and a document icon. A large red arrow points to the text 'Entity Administrator'. The right panel, titled 'User's Roles', contains two entries: 'Entity Administrator' and 'Entity Registration Representative'. Each entry is preceded by a minus sign in a square and a document icon.



# Enter the reason for invitation.

## Select Next.

Empty text input field

Empty text input field

First Name :\* Your

Last Name :\* Name

Invite Reason :\*



## Select Submit.

Last Name :

Name

Roles

EDIT

### User's Roles

+ - Entity Administrator

Reason for Invite: point of contact

CANCEL



SUBMIT



## Select Done.

MY SAM    SEARCH RECORDS    DATA ACCESS    GENERAL INFO    HELP

### Invite User


Invitation Set - Confirmation

Confirmation

Mon Apr 29 11:44:50 EDT 2013

Invitation has been sent to the user. Upon accepting the invitation, the user will be associated with your entity via the roles you have granted. Use the **Done** button to continue.

PRINT    SAVE    **DONE**





# How to Accept An Invitation





# Accept an Invitation.

(1) Select Manage My User Roles.  
(2) Select Invitations.

The screenshot displays the MY SAM user interface. On the left is a navigation menu with the following items: Manage My User Roles, My Roles, Invitations, Migrate Legacy System Account, Migrated Accounts, Request Role with New Entity, Register/Update Entity, Account Settings, Data Access, and General. The 'Manage My User Roles' item is highlighted in blue and has a red arrow with the number '1' pointing to it. The 'Invitations' item has a red arrow with the number '2' pointing to it. The main content area shows a message: 'Would you like to migrate a legacy system account?' with 'YES' and 'HIDE MESSAGE' buttons. Below this is a 'Notice for all registered users:' section. The notice text reads: 'With American Industry Classification Standards (NAICS codes) are now active. As part of this change, the Small Business Administration (SBA) has been reviewing and updating its table of size standards. Size Standards changes have taken place on the following dates: 1. October 1, 2012 2. October 24, 2012 3. January 7, 2013 Impact to you: 1. The NAICS you selected in the Assertions section of your registration will not be affected and no action is needed at this time. However, the next time you update your record, you will be required to update the NAICS to ensure that they are in accordance with the 2012 list. 2. The NAICS lists to which you certified in your representations and certifications will be updated as follows: If the description of the NAICS has been changed, you will now see the 2012 version of the description in the table. If the size standard itself has been changed, and this affects the "Yes" or "No" answer (Small or Other Than Small) on your NAICS tables at 52.219-1 and 52.212-3, SAM will place an exclamation point (!) next to the "Yes" or "No" answer to show that it should be reviewed. The next time you update your reps and certs the answers will be displayed as per the 2012 standards, so you can certify to those at that



# Accept the Invite.

## Select View.

**MY SAM**

Manage My User Roles

Register/Update Entity

Account Settings

Data Access

General

**View Invitations**

View Invitations

The section below contains a list of invitations you have received to join an entity and/or to receive roles within an entity.

View	Invitation Date	Entity Name	Roles	Inviter's First Name	Inviter's Last Name
<a href="#">VIEW</a>	2013-04-29 11:44:49.0	Your company	Entity Administrator, Entity Registration Representative, Services Contract Inventory Reporter, Entity Registration Viewer	Your	Name



Select Accept.

**Granted Roles**

Entity Administrator

CANCEL

DECLINE ACCEPT





## Select Done.

MY SAM    SEARCH RECORDS    DATA ACCESS    GENERAL INFO    HELP

### Individual Pending Invitation Received


Entity Association - Confirmation

Confirmation

Mon Apr 29 11:48:50 EDT 2013

You are now associated with this entity and your roles have been activated. Use the 'Done' button to continue.

PRINT    SAVE    **DONE**





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